



SIEBEL⁷
eBusiness

GUIDE TO EXPERT SERVICES

VERSION 7.5

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Guide to Siebel Expert Services

Siebel Expert Services is a global staff of specialists who serve as technical reviewers and auditors of implementation activities to ensure the quality of Siebel eBusiness implementations. The Siebel Expert Services specialists use technical workshops, reviews and onsite consultation to ensure that the implemented solution achieves the expected levels of performance, scalability, upgradeability, and optimized functionality. The Technical Account Manager will schedule Siebel Expert Services throughout the implementation. By relying on the deep technical knowledge and experience of Siebel Expert Services specialists, organizations can keep IT infrastructure and development costs down, reduce risk, provide investment protection, lower the cost of ownership, and maximize ROI.

Siebel Expert Services provide three main types of service to help guide, assist and quality assure the technical implementation.

Technical Workshops: Siebel Expert Services workshops provide advice, support, and guidance on technical best practices for deploying Siebel eBusiness Applications, technologies, and the Siebel architecture. Key features of these workshops are:

- Interactive sessions scheduled at the beginning of the design phase and tailored to the customer project team to address issues and misconceptions.
- Insight into the best way to implement a specific solution based on experience and best practices. Note: Workshops are offered on an ongoing basis to guide implementation towards key milestones.

Technical Reviews: Technical reviews reduce the risk of encountering problems at runtime and provide customers confidence in deploying the Siebel solution. These reviews are a series of assessments and detailed checklists conducted at key stages in the project that identify issues with performance, non-conformance to standards and general defects. Key features are:

- Identifying issues throughout the implementation before key milestones are reached.
- Providing best practice advice and clear cut recommendations for specific solutions.
- Partners and Customers can leverage the experience that expert services has gained from thousands of Siebel eBusiness Implementations to increase implementation effectiveness.

Architecture and Configuration Assistance: In order to supplement the traditional Configuration and Architecture Service offerings, Expert Services also offers its functional and technical expertise by providing a named expert, supporting a customers project with periodic but sustained engagements during design and configuration phase of a Siebel eBusiness project.

Capabilities: Siebel Expert Services works closely with Siebel Product Marketing and Engineering departments as well as Siebel Alliance Partners to develop broad and in-depth technical knowledge in Siebel eBusiness Applications, technologies and the Siebel Performance Tuning: query and view performance, RDBMS, EIM batch loads, upgrade optimization, and scalability testing.

- Configuration and Design: Expertise in Siebel Tools and Data modeling for the following applications: Siebel Call Center, Siebel Sales, Industry Applications
- Architecture: Infrastructure Sizing, Topology, Security, OS/RDBMS, Backup and Recovery Strategies, Global Deployment
- Server Components: Assignment Manager, Workflow Process Manager, Siebel Remote, etc.
- UAN and EAI: Transport Adapters, SAP Connector, Oracle Connector
- Siebel Object Scripting: VB/OLE, eScript, JavaScript
- Upgrade: Repository merge, script migration, performance optimization

Expert Services Product Review Matrix

Product Review Matrix

Expert Services provides a wide range of offerings that covers the broad product set and Siebel eBusiness Architecture platform. The Product Review Matrix helps to ensure that TAMS, Customers and Partners understand which offerings support each key technology area and where in the implementation cycle these offerings fit.

TECHNOLOGY ARENA PROJECT PHASE	Tools Configuration and Design		Architecture , Server Component and CTI	EAI, Scripting and Smarts scripting		Analytics and Reports	
Discover	Sizing Review						
Design		Review		Review		Review	Review
Configure	Workshop	Review	Workshop	Review	Workshop	Review	Review
Validate	Performance Tuning Audit						
Deploy	Production Readiness Review						
Post Deploy	Production Health Check						

Tailored Reviews and Workshops

Expert Services provides formal workshops and reviews around the most common services requested. These reviews are detailed in the product review matrix detailed in this document. Expert Services will also tailor a specific review to items not detailed in this document. Please refer to your TAM or your local Expert Services resource manager to tailor a specific review/workshop to specific technologies/products and life cycle stages.

Architecture, Server Component and CTI

Architecture and Server Component workshops

Architecture workshops provide help, guidance, assistance and knowledge transfer when deploying Siebel application components and the Siebel Architecture and the Siebel Server Components.

- [Architecture Workshop](#)
- [Global Deployment Workshop](#)
- [CTI Workshop](#)

Architecture and Server Component Design Reviews

Architecture and Infrastructure design reviews evaluate the proposed deployment of the Siebel architecture and Server Components.

- [Assignment Manager Design Review](#)
- [Workflow Manager Design Review](#)
- [CTI Design Review](#)

[CTI Configuration Review](#)

Areas that can be considered in the Architecture Workshops and Reviews generally cover the following areas:

Server Infrastructure and Topology	X
Siebel platforms (OS/RDBMS)	X
Siebel Remote	X
Siebel Assignment Manager	X
Siebel Workflow Manager	X
Content Management	X
Global Deployment	X
Siebel Security	X
Siebel High Availability	X
High Level Network Performance	X
Performance	X

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EAI and Scripting Reviews

EAI and Script workshops

EAI and Script workshops provide help, guidance, assistance and knowledge transfer when deploying the Siebel application network such as EAI, Pre-built connectors and Siebel Object scripting.

[EAI Workshop](#)

[Scripting Workshop](#)

EAI and Script Design Reviews

EAI and Script design reviews provide help, guidance, assistance and knowledge transfer when deploying the Siebel application network such as EAI, Pre-built connectors and Siebel Object scripting.

[EAI Design Review](#)

[EIM Mapping and Design Review](#)

[Script Design Review](#)

EAI and Script Implementation/Configuration Reviews

EAI and Script configuration reviews provide help, guidance, assistance and knowledge transfer when configuring the Siebel application network such as EAI, Pre-built connectors and Siebel Object scripting.

[EAI Configuration Review](#)

[Script Code Review](#)

Items that can be considered in these services include:

Siebel EAI	X
Siebel Object Scripting	X
Siebel EIM	X
Siebel Pre-Built Connectors (SAP Connector, Oracle Connector, PSFT Connector etc.)	X

Architecture and Server Component Workshop

Architecture Workshops provide advice, help and guidance on technical best practices when deploying the Siebel Architecture. They will:

- Determine best approach for the Siebel Architecture and Server Component processes.
- Validate high-level approaches for the Siebel Architecture and Server Component processes.
- Highlight any incorrect assumptions and approaches that might result in backtracking
- Implementation team can gain insight regarding the best way to implement a specific architecture solution where they have been unable to determine the most appropriate deployment options.

Some of the key areas the Architecture Workshops may assist project teams with Siebel Architecture and Server Component environment will:

- Determine the optimum architecture deployment strategy including degree of centralization and distribution of servers, including Siebel replication and remote strategies.
- Determine the optimum database and server performance strategies.
- Determine the best strategy for Security in the Siebel eBusiness application.
- Discuss High Availability considerations
- Discuss Backup and Recovery Strategies

Areas Covered in this Workshop

Architecture workshops can be tailored to assist specific items of the Siebel Architecture. The major areas that may be covered are:

- Siebel Architecture and Server Infrastructure
- Siebel High Availability
- Siebel Security
- Siebel Database considerations (Backup and Recovery)
- High-Level Sizing
- Siebel Workflow Manager and Assignment Manager
- Siebel Remote and Replication Manager

Please be sure that the areas to be discussed are specified in order to assign the specialists with the correct skill set required.

[Pre-Requisites, Checkpoints and Engagement Details](#)

Architecture Workshop Discussion Items	
High level hardware sizing and hardware configurations	X
Backup and recovery strategies	X
Assist in Database and Server performance optimization strategies	X
High level interface strategies, options and design including EIM	X
High Level Assignment Manager and Workflow Manager objectives	X
Discuss/validate various deployment strategies including Siebel Remote and Siebel Replication	X
Discuss/validate rollout options (Central, Distributed etc)	X
Discuss Siebel Remote/Replication options	X
Discuss Mid Tier setup for Object Manager	X
Discuss High Availability Strategy	
Discuss High Level Security	X
Discuss Network Performance	X
Discuss options for specific server processes	X
Discuss options for specific architecture requirements	X
Discuss options for specific performance requirements	X
Workshop Pre-Requisites	
Architecture Workshop Questionnaire	X
List of Issues for discussion during the Workshop	X
Documentation pertaining to the implementation of the Siebel Architecture	X
Workshop Engagement Details	
Engagement Length	1-2 days (Engagement document 1 day billable activity)
Location	On-Site
Follow up conference call	NO
Other Requirements	Access to the DBA and lead architect
Special Note 1	There is no formal deliverable associated with this engagement. An optional review deliverable document may be delivered to the project team (1 day billable activity)
Special Note 2g	It is important the Siebel TAM and customer understand that the Architecture Workshop is intended to complement, not replace, the standard reviews.
Special Note 3	Please notify the Expert Services scheduler of the specific areas for discussion in order to assist allocation of most suitable resource.

Design and Configuration Workshop

Design and Configuration Workshops provide advice, help and guidance on technical best practices to project teams implementing Siebel applications through Siebel Tools.

Application Workshops help the implementation team deliver a technically excellent solution through the following means:

- Determine best approach for the Siebel implementation team when configuring through Siebel tools.
- Validate high-level approaches when configuring through Siebel Tools and outline the specific best practices for this approach.
- Highlight any incorrect assumptions and approaches that might result in backtracking.
- Implementation team can gain insight regarding the best way to implement a specific solution where they have been unable to determine the most appropriate deployment options.

Some of the key areas the Application Workshops may assist project teams with Siebel Tools development will:

- Determine when to use standard “out of the box” functionality instead of unnecessary configuration
- Discuss and validate configuration options to ensure upgradeability, maintainability, stability and performance
- Discuss and work to resolve specific configuration and design issues that the implementation team require to learn/resolve
- Discuss methods to optimize performance when configuring through Siebel Tools

Design and Configuration Workshop

The workshops can assist with teams implementation the following Siebel applications:

- Siebel Call Center and Service (CSS)
- Siebel Interactive Selling Suite (ISS)
- Siebel Marketing Enterprise (SME)
- Siebel Employee Relationship Management (ERM)
- Siebel Partner Relationship Manager (PRM)
- Siebel Industry Solution (Finance, Pharma etc.)

[Pre-Requisites, Checkpoints and Engagement Details](#)

Design and Configuration Workshop Discussion Items

High-level Data Model Design Review can be discussed and validated	X
Discuss best practice guidelines and development standards (e.g. considering docking visibility when data mapping, cloning objects, Database Extensibility etc.) specific to the customers Siebel eBusiness implementation,	X
Mapping business data to Siebel data model	X
Database Extensibility	X
Data Visibility and Multi-Org	X
Discuss Design/Config options for specific applications (Sales, Service, etc.)	X
Discuss Design/Config options for specific verticals (eFinance, ePharma etc.)	X
Discuss Design/Config options for specific modules (Incentive compensation etc.)	X
Discuss Design/Config options for specific performance of specific views	X
Discuss Design/Config options for max functionality and minimum configuration	X
Discuss Design/Config options for specific functionality requirements	X

Workshop Pre-Requisites

Functional ERD	X
Technical ERD	X
Design Documents and List of Issues for discussion	X

Workshop Engagement Details

Engagement Length	1-3 days
Location	On-Site
Follow up conference call	NO
Stage in Project	Discover, Design, Configure
Other Requirements	Access to the Lead Configurator and Project Manager
Special Note 1	There is no formal deliverable associated with this engagement. An optional review deliverable document may be delivered to the project team (1 day billable activity).
Special Note 2	It is important that the Siebel TAM and customer understand that the Configuration Design Workshop is intended to complement, not replace, the standard design and configuration reviews.
Review Deliverables	Optional Engagement document (1 day billable activity)

Design Review

The Expert Services Design Review will reduce the risks of issues at runtime and give customers confidence in allowing the implementation to go live by evaluating the customers proposed design of the Siebel Application. Design Reviews assist the implementation team deliver a technically excellent solution through the following means:

- The Siebel implementation team obtains an understanding of areas within their design that can be enhanced during design and prior to configuration. This will save the team time by highlighting areas that would require significant rework if implemented.
- Expert Services will proactively identify any major show stopping issues that may compromise the technical excellence of the Siebel eBusiness solution and work very closely with the implementation team (Customer, Partner or SPS) to ensure that an acceptable solution is achieved.
- The Reviews can assist with teams configuring the following Siebel Applications:
 - Siebel Sales, Siebel Call Center and Service (CSS)
 - Siebel Interactive Selling Suite (ISS)
 - Siebel Marketing Enterprise (SME)
 - Siebel Employee Relationship Management (ERM)
 - Siebel Partner Relationship Manager (PRM)
 - Siebel Industry Solutions (Finance, Pharma, CPG etc.)
 - Siebel Handheld

Design Reviews evaluate the proposed design and can significantly reduce deployment risk, ensure investment protection and Accelerated/Increased ROI.

- A design review can provide guidance to the team to ensure that full use of standard siebel functionality without the need for over complex configuration, customization and redesign. Saves time, effort and risk.
- Minimizing unnecessary customization and redesign will help to make full use of the Siebel Automated upgrade function and ensure that upgrades require the minimum of development time and cost, are risk free, and allow the customer to take advantage in any new features and functionality.
- UI performance can be maximized by reducing poor configuration practices that could potentially generate poor SQL, overload networks (high number of packets of LAN/WAN), in addition, ES will focus on inefficient design that does not use the optimal configuration, code, or technologies.

[Pre-Requisites, Checkpoints and Engagement Details](#)

Design Review Checkpoints

General Checkpoints (All Applications)		X
Provide recommendations to ensure clean and consistent UI		X
Identify visibility issues through configuration		X
Review of configured functionality that may be extracted using Standard functionality		X
Optimize the configurations including the HTML template configurations		X
Review the use of standard Siebel Objects		X
Review the use of custom Siebel Objects within Siebel Tools		X
Areas that could affect Performance		X
Areas that could affect Maintainability		X
Areas that could affect Upgradeability		X
Areas that could affect Data Integrity		X
ISS and ERM Specific Check Points		
Basic and Advanced and Logic Rules		X
Model Structure		X
SME Specific Checkpoints		
Join Strategies		X
Contact Key Formats		X
Customer Hierarchies		X
Mappings of any external data entries from the OLAP to the OLTP database (Contacts/Prospects).		X
Please note that the scope of this review will only cover external data source mappings to the Siebel OLAP database. Any external data outside of the Siebel OLAP/OLTP database is beyond the scope of this review		
Any configuration changes required to the SME Application (involving changes to the Views, Business Components, etc.).		X

Design Review Pre-Requisites

Siebel Repository. This is the same as the Siebel Tools database used by developers when performing configurations against a local database. Typically, the file name is sse_data.dbf. All projects need to be checked in and unlocked. Do not send a .dat file containing an exported repository.	X
Extracted User Database* with sufficient data. This is the database for a remote user.	X
Repository File (.srf file). The SRF file should be compiled from scratch against the completed repository.	X

Design Review Engagement Details

Engagement Length	Minimum of 3 days
Location	Off-Site
Pre and Post Review	Yes
Conference Call	
Other Requirements	Access to the Lead Configurator and Project Manager
Special Note	Expert Services can also review the proposed design of the Siebel script to be implemented. Simply schedule a Script Design Review in addition to the design review.
Review Deliverables	Final comprehensive review document discussing: <ul style="list-style-type: none"> - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call with the customer project team and Siebel TAM.

Configuration Review

Configuration Reviews will reduce the risks of issues at runtime and give customers confidence in allowing the implementation to go live by evaluating the customers configuration of Siebel Tools.

Configuration Reviews help the implementation team deliver a technically excellent solution through the following means.

- Developers and Business Analysts can gain insight regarding the best way to implement specific configurations where they have been unable to determine the most appropriate configuration options.
- The Siebel implementation team obtains an understanding of areas within their configuration that can be enhanced during configuration.
- Ensure that configuration of the Siebel application follows recommended best practice standards to optimize performance, upgradeability, stability and maintainability.
- Provide recommendations on the best way to configure requirements when development team has not been able to determine the most appropriate approach.

Configuration Reviews evaluate the configured solution and can reduce deployment risk, ensure investment protection, and Accelerated/Increased ROI.

- A configuration review can minimize upgrade and support issues by identifying poor configuration practices that will lengthen the upgrade process.
- UI performance can be maximized by reducing poor configuration practices that could potentially generate poor SQL, overload networks (high number of packets of LAN/WAN), in addition ES will focus on inefficient design that does not use the optimal configuration, code, or technologies.
- In many instances it is possible to provide functionality using the standard out of the box configuration rather than using over complex configuration and customization, which will reduce development time and costs.
- Identify areas where to use standard “out of the box” functionality instead of configuration.
- Verify the accuracy of the configurations performed by the development team
- Ensure that configuration of the Siebel application follows recommended best practice standards to optimize performance, upgradeability, stability and maintainability.

Configuration Review Details

The Reviews can assist with teams configuring the following Siebel Applications through Siebel Tools:

- Siebel Sales, Siebel Call Center and Service (CSS)
- Siebel Interactive Selling Suite (ISS)
- Siebel Marketing Enterprise (SME)
- Siebel Employee Relationship Management (ERM)
- Siebel Partner Relationship Manager (PRM)
- Siebel Industry Solution (Finance, Pharma, CPG etc.)
- Siebel Handheld

[Pre-Requisites, Checkpoints and Engagement Details](#)

Configuration Review Checkpoints	
General Checkpoints	
Provide recommendations to ensure clean and consistent UI	X
Identify visibility issues through configuration	X
Review of configured functionality that may be implemented using Standard functionality	X
Review the use of standard Siebel Objects	X
Review the use of custom Siebel Objects within Siebel Tools	X
Areas that could affect Performance	X
Areas that could affect Maintainability	X
Areas that could affect Upgradeability	X
Areas that could affect Data Integrity	X
ISS and ERM Specific Checkpoints	
Creation of the Model Structure	X
Rules that have been created to support the model	X
Tools eConfigurator Object Changes	X
Areas in the script that could be implemented through standard functionality or configuration	X
ePricer pricing factors and Tools	X
SME Specific Checkpoints	
Configuration of key Join Strategies	X
Contact Key Formats	X
Configuration of Customer Hierarchies	X
Configuration Review Pre-Requisites	
<i>Generic Configuration Review Pre-Requisites</i>	
Siebel Repository. This is the same as the Tools database used by developers when performing configurations against a local database. Typically, the file name is sse_data.dbf. All projects need to be checked in and unlocked. Do not send a .dat file containing an exported repository.	X
Extracted User Database* with sufficient data. This is the database for a remote user.	X
Repository File (.srf file). The SRF file should be compiled from scratch against the completed repository.	X
Siebel configuration File (CFG) for the specific application to be reviewed	X
Login IDs and passwords for the repository and extracted database	X
The version of Siebel and database platform/version for the implementation. Even if this data was included in the original request form, it should be sent again. For the version of Siebel, specify down to the build number.	X
A prioritized list of views that should be evaluated, as well as a list of the screens the reviewer should see when logging into the customized application	X
A list of the client's issues and concerns regarding the configuration	X
A list of the client's issues and concerns regarding the configuration	X
These files are also required for Configuration Review if modified from standard Siebel templates:	
(<server root>:\WEBTEMPL\LANG)	X
Images (<server root>:\sweapp\PUBLIC\IMAGES)	X
Swecommon.js file if modified (<server root>:\sweapp\PUBLIC\[LANG]\[BUILD]\SCRIPTS)	X

Browser Scripts (<server root>:\sweapp\PUBLIC\[LANG]\[SRF VERSION]\bscripts)	X
Style sheets (.css) (<server root>:\sweapp\PUBLIC\FILES)	X
Extracted User Database* with sufficient data. This is the database for a remote user.	X
Repository File (.srf file). The SRF file should be compiled from scratch against the completed repository.	X
Configuration Review Engagement Details	
Engagement Length	4 days (3 days for Siebel 5/6)
Location	Off-Site
Pre and Post Review	Yes
Conference Call	
Other Requirements	Access to the Lead Configurator and Project Manager
Special Note	A standard Configuration Review does not include a review of either Siebel Script or reports. If this is desired as an additional requirement, it should be specified when the review is scheduled.
Review Deliverables	Final comprehensive review document discussing: <ul style="list-style-type: none"> - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call with the customer project team and Siebel TAM

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Sizing Review

Sizing reviews help the implementation team deliver a technically excellent solution through the following means:

- The Sizing Review is designed to provide guidelines for hardware purchases and Architecture Deployment. Siebel Expert Services leverages its in-depth experience from a wide array of deployments to conduct this comprehensive review.
- The Siebel implementation team obtains an understanding of areas within their proposed architecture and database configuration that can be enhanced. This will save the team time by highlighting areas that would require significant rework if implemented once the implementation goes live.

The sizing review can assist implementation teams deploying the Siebel Architecture:

- Hardware and Database Sizing
- Backup and Recovery Strategy
- Assistance with design of Server Topology

Sizing Review Benefits

The Sizing Review may help the project team with the following areas:

- Size the DB and Siebel server correctly for user and data growth
- Ensure correct sizing of hardware for running server resources (EIM, Workflow, AM)
- Ensure Correct Sizing of Analytics Environment
- Ensure correct understanding of Siebel Architecture to determine how server components are used
- Understand the capacity requirements for Siebel Remote and Replication
- Ensure correct DB configuration and pro-actively prevent DB degradation
- Reduce the likelihood of nonstandard software/solution or improper server configuration.
- Ensure correct number of disks that are required to achieve the required RAID configuration
- Understand the data integrity requirements for the gateway/Siebel server and file system
- Outline best practices for maintaining DB integrity specific to the customers requirements

[Pre-Requisites, Checkpoints and Engagement Details](#)

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Sizing Review Checkpoints

General Database Sizing	X
Major Database Table Sizing	X
Hardware Sizing recommendations for all Tiers	X
Network Performance Guidelines and Metrics	X
Recommend High Level Backup Strategy	X
Recommend High Level Recovery Strategy	X
Recommend Performance and Scalability best practices	X
Provide High Availability Considerations	X
Consider customer specific Architecture Deployment issues	X
Consider Server Components Usage	X
Provide guidance on OS and Database supportability	X
SME and eBusiness Analytics Specific Items	
OLAP Database Size	X
Recommend sizing requirements for OLAP Database Server	X
Hardware sizing guidelines for the Informatica Server	X
Hardware Requirements for the Business Objects Server	X
Recommend optimum server topology for OLAP Server and Informatica Server and Business Objects Server	X
Network requirements	X
Provide information on Siebel-related issues affecting backup and availability strategies	X

Sizing Review Pre-Requisites

Sizing Review questionnaire	X
Completion and documentation of the systems functional design	X

Sizing Review Engagement Details

Engagement Length	Minimum of 2 days
Location	Off-Site
Pre-requisite Reviews	N/A
Follow up conference call	Yes
Other Requirements	Access to the Technical Architect and DBA
Special Note	If a High Availability environment is to be implemented, it is recommended that an Architecture workshop is undertaken after the sizing review.
Review Deliverables	Final comprehensive review document discussing: - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call with the customer project team and Siebel TAM - For SME please complete the SME Sizing Questionnaire
SME Specific	If there is an OLTP environment already implemented and the SME/OLAP is to be implemented in future PROJECT phases, Expert Services will size the OLAP environment and will also include the resizing of specific tables or considering any new dataloads in or out of the OLTP database. <ul style="list-style-type: none">▪ Campaign Management Tables▪ Data Loads to/from OLTP to OLAP via ETL▪ Provide a Sizing Review document with all findings and recommendations, to be reviewed during a follow-up conference call.

Workflow Manager Design Review

The Workflow Policy Manager Design Review provides an opportunity to evaluate workflow objectives, programs and policies and to identify potential challenges related to the client's proposed strategies. This review should be scheduled after a Sizing Review and before the Assignment Manager Review.

The Workflow Design Review encompasses various optional components, depending on the client's needs. When all components are performed, the review will:

- Determine if the workflow can accomplish everything required, or if other means (Siebel Visual Basic, Assignment Manager, pre-defaulting fields, etc.) should be considered.
- Determine whether any non-vanilla Siebel Workflow Objects have been created, and if so, with what impact on the system.
- Ascertain whether workflow programs are complete and performing as expected.
- Determine completeness of workflow policies and whether they can be further optimized.
- Examine how policies and data volumes affect end users.
- Ensure early awareness of any elements that are incomplete or do not meet client expectations
- Provide a set of strategies for grouping workflow policies to achieve performance and throughput goals.
- Provide a report that reviews all of the basic elements of the Siebel Workflow Manager, including strengths and weaknesses of the current design.

Review Pre-requisites

The following information is required prior to a Workflow Design Review:

Description of client's workflow programs and policies	X
Performance and throughput goals	X

The following information is required prior to a Workflow Design Review

Description of client's workflow programs and policies	X
Performance and throughput goals	X

WFM/AM Review Engagement Details

Duration	1-3 days (Depending on complexity of the project)
Location	Typically Off-Site

Review Process

During two conference calls between the reviewer and the project team, specific workflow design issues are discussed. The first call covers how the business works, what the objectives are, a general overview of policies and actions, and capacity information as it relates to volume of policy violations. The second call allows the reviewer and design team to address any questions about the review.

Participants should include the business personnel requesting the policies, those knowledgeable about business volumes governed by the policies, the technical team that developed the workflow components (workflow objects, programs, actions, policies, groups), and the Siebel Technical Account Manager, if possible.

Scripting Workshop

The Siebel Scripting Workshop is a one-day onsite workshop that provides a dual role:

- Management gains a comprehensive overview of the opportunities Siebel Scripting technologies provide.
- Developers get a jumpstart in designing and implementing Siebel Scripting in their projects.

The purpose of the workshop is to allow all members of the project team to understand all the options and recommended techniques available when considering implementing Siebel Scripting. An Expert Services specialist will lead the workshop presentation and discussion. The TAM and the Specialist will tailor the workshop to concentrate on the customer's current needs.

Areas covered in the workshop generally include:

- Overview of Siebel Scripting
- Coverage of Siebel VB or Siebel eScript
- Discussion of best practices in the development of Siebel Scripting code
- Discussion of Thin-UI / non-UI coding techniques
- Group exercise to rewrite a code sample from the project in line with recommendations
- Suggested approaches for code-related issues currently facing the project

The following is a description of the workshop topics, the requirements for scheduling and conducting the workshop, and the expectations for this workshop.

Another large component of the workshop is targeted at Siebel developers and concentrates on specific best practices in Siebel Scripting and the technical implementation of each. This workshop focuses on the issues that most frequently complicate projects with regard to maintenance, upgrading, reliability and performance. These are identified issue-by-issue and discussed thoroughly.

Siebel Scripting Best Practices (Examples)

- Object Destruction
- Error/Exception handling
- ActivateField
- Active* methods
- Dead code
- Common Code
- GotoView
- Limiting the volume of code
- Browser versus server scripting best practices

Workshop Pre-requisites

The following information is required prior to a Scripting Workshop:

A brief description of the client's business requirements or process relating to the Siebel Script and to identify whether the customer has any specific design requirements which need to be addressed during the workshop.

If the customer already has requirements and design specifications developed, these documents should be provided to the Specialist.

Providing implementation specific information such as middleware or system vendors to the Specialist well in advance of the engagement can help ensure that the customer gains maximum benefit from the day.

If any scripting code has already been developed, a copy should be provided to the specialist prior to the Workshop.

Review Process

Engagement Length	1-2 days
Location	On-Site

Script Design Review

Script Design Reviews provide advice, help and guidance on technical best practices when implementing Siebel Object Scripting and assists the implementation team in the following means:

- The Siebel implementation team obtains an understanding of areas within their script design that can be enhanced during design and prior to configuration. This will save the team time by highlighting areas that would require significant rework if implemented.
- Developers and Business Analysts can gain insight regarding the best way to implement requirements where they have been unable to determine the most appropriate design.
- Expert Services will proactively identify any major show stopping issues that may compromise the technical excellence of the Siebel Scripting solution. Expert Services will work very closely with the implementation team (Customer, Partner or SPS) to ensure that an acceptable solution is achieved.
- These reviews will reduce the risks of issues at runtime and give customers confidence in allowing the implementation to go live.

Benefits of the Script Design Review

Items included in the review generally include:

The Script Design Review provides the client with the following:

- A complete review of the planned use of Siebel interfaces, including but not limited to, proper use of the Siebel Objects and Methods, optimizing algorithms using Siebel Interfaces, and proper delineation of code between configuration vs. Siebel VB/eScript vs. external code (DLL's and executables) using Siebel programming interfaces (e.g. COM, CORBA, ActiveX, Java Bean, etc.)

[Pre-Requisites, Checkpoints and Engagement Details](#)

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Script Design Review Checkpoints	
Siebel Objects	X
Siebel Methods	X
Correct use of external code	X
Siebel Programming Interfaces (CORBA, COM, JAVA)	X
Algorithm and Optimization and Interfaces	X
Areas that affect Scalability	X
Areas that affect Performance	X
Areas that affect Upgradeability	X
Areas that affect Functionality	X
Areas that affect Data Integrity	X
Areas that affect Maintainability	X
Areas that affect Supportability	X
Script Design Review Pre-Requisites	
Document describing the intent of the code to be written, the purpose of the project and any pertinent information needed for general understanding	X
An outline of the planned implementation	X
Completion and documentation of the systems functional design	X
Script Design Review Engagement Details	
Engagement Length	3 days
Location	Off-Site
Follow up conference call	Yes
Other Requirements	Access to lead Configurator/Script Developer
Review Deliverables	Final comprehensive review document discussing: <ul style="list-style-type: none"> - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call with the customer project team and Siebel TAM

Script Code Review

The Expert Services Script Code review is a review of the code that will support a Siebel eBusiness implementation and is designed to assist the design and development team in the following areas:

- The Siebel implementation team obtains an understanding of areas within their script code that can be enhanced prior to testing and rollout. This will save the team time by highlighting areas that would require significant rework if implemented.
- Developers and business analysts can gain insight regarding the best way to implement requirements where they have been unable to determine the most appropriate design.
- Expert Services will proactively identify any major show stopping issues that may compromise the technical excellence of the Siebel Script solution. Expert Services will work very closely with the implementation team (Customer, Partner or SPS) to ensure that an acceptable solution is achieved.
- These reviews will reduce the risks of issues at runtime and gives customers confidence in allowing the implementation to go live.

The Code Review provides the client with a complete review of the coding of Siebel interfaces, including but not limited to proper use of the Siebel Objects and Methods, optimizing algorithms using Siebel Interfaces, and proper delineation of code between configuration vs. Siebel VB/eScript vs. external code (DLL's and executables) using Siebel programming interfaces (e.g. COM, CORBA, ActiveX, Java Bean, etc.).

Script Code Reviews evaluate the coding of the Siebel Interfaces and can significantly reduce deployment risk, ensure investment protection and Accelerated/Increased ROI.

- Eliminating or minimizing custom script in the repository ensures that the application is easier to maintain for customers and partners.
- There are specific guidelines and issues when calling external DLL's that will make the application easier to support that the Script review may be able to recommend.
- The script review will provide recommendations on using standard Siebel functionality rather than using custom script which will reduce development effort, time and ensure that the upgrade process is smoother and implemented in less time.

[Pre-Requisites, Checkpoints and Engagement Details](#)

Script Code Review Checkpoints

Siebel Objects and Methods	X
Correct Use of External Code	
Siebel Programming Interfaces (CORBA, COM, JAVA, ACTIVE X etc.)	X
Algorithm and Optimization and Interfaces	X
Areas that could affect Scalability	X
Areas that could affect Performance	X
Areas that could affect Upgradeability	X
Areas that could affect Functionality	X
Areas that could affect Data Integrity	X
Areas that could affect Maintainability	X
Areas that could affect Supportability	X
Resilience, efficiency, and clarity of the code written in the Siebel eBusiness Application	X

Script Code Review Pre-Requisites

<p>Siebel Repository. This is the same as the Tools database used by developers when performing configurations against a local database. Typically, the file name is sse_data.dbf. All projects need to be checked in and unlocked. Do not send a .dat file containing an exported repository.</p>	X
<p>Extracted User Database* with sufficient data. This is the database for a remote user. It is also usually called sse_data.dbf but is stored in the client directory structure vs. the Tools directory structure.</p>	X
<p>Login IDs and passwords for the repository and extracted database</p>	
<p>Any external source code to be reviewed. The code should be in Microsoft Visual Basic form, VBA form, or simple text. Code in non-VB languages (e.g. Java, C++) may or may not be reviewable by Expert Services depending on the language in question and our available resources at that time.</p>	X

Script Design Review Engagement Details

<p>Engagement Length</p> <p>Location</p> <p>Follow up conference call</p> <p>Other Requirements</p> <p>Review Deliverables</p>	<p>3 days</p> <p>Off-Site</p> <p>Yes</p> <p>Access to lead Configurator/Script Developer</p> <p>Final comprehensive review document discussing:</p> <ul style="list-style-type: none"> ▪ Major issues and suggested recommendations ▪ Assistance to specific issues noted ▪ Follow up conference call with the customer project team and Siebel TAM
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EAI Workshop

The Siebel 7 EAI Design Workshop is a one-day onsite workshop that provides management with a comprehensive overview of Siebel 7 EAI Technologies and provides Siebel integrators with a jumpstart in approaching Siebel 7 EAI Integrations coupled with a forum to explore any ideas that are under consideration.

The purpose of the workshop is two-fold. First, it helps the customer management team to understand how Siebel EAI works, how it fits in their environment and how to align integration business needs with strategic direction. Second, it brings experienced Siebel integrators quickly up-to-speed in configuring Siebel EAI by leveraging existing knowledge to explain how EAI technologies complement and extend existing skills.

A Siebel Expert Services EAI Specialist will lead both any presentation and discussion. The TAM and the Siebel Specialist will tailor the workshop to suit the customer's current needs.

The Siebel EAI Design Workshop is designed to be a one-day presentation and instructional discussion. Often the workshop is divided into two sessions. The morning session focuses on understanding the Siebel EAI architecture including any migration and upgrade considerations that need examined. The topics covered in this session are generally high-level and are targeted towards the technical managers. The afternoon session focuses on design and configuration. This session is targeted towards experienced Siebel integrators and developers. The Siebel EAI Specialist will often walk through an exercise to demonstrate how to configure a simple Siebel integration point.

While specific comments about unreleased versions of the software will not be made, the specialist will try to educate and guide customers towards an integration strategy consistent with the published Siebel Statements of Direction wherever possible. This can include suggestions for a migration path from existing integration requirements towards making full use of Universal Application Networking (UAN) in the future.

Some of the key areas the Application Workshops may assist project teams with Siebel Tools development are:

- Identifying Integration Points
- Point to Point Versus Middleware
- Integration Strategies
- Workflow Process Manager
- Using COM and Corba
- Siebel Business Services and Virtual Business Components
- Out of the Box Connectors (SAP, Peoplesoft, Oracle)

[Pre-Requisites, Checkpoints and Engagement Details](#)

EAI Workshop Discussion Points	
Siebel EAI Architecture: The Architecture of Siebel 7 and previous versions	X
General Siebel EAI architecture, exploring the options	
How business requirements drive technology selection	X
Siebel 7 EAI features	X
Proposed features for Universal Application Networking	X
Identifying validated 3 rd party adapters	X
Performance/Maintenance considerations for integration	X
How is Siebel EAI configured	X
SAP Connector Specific Discussion Points	
Present an overview and functionality of EAI & SAP Connector architecture	X
Configure standard Connector for development and testing	X
Configure BAPI Integration Object definitions as necessary for real-time integration (in case of definition mismatch due to BAPI customization or version)	X
Demonstrate asynchronous (IDOC) and real-time (BAPI) integration points using standard mappings	X
EAI Workshop Pre-Requisites	
Implementation specific information such as middleware or system vendors to the Specialist	X
Technical Account Manager (TAM) should describe the Workshop to the customer and work with the customer to identify and prioritize issues that the customer would like to discuss	X
Requirements and Design specification documents to be sent to the specialist	
SAP Connector Specific Discussion Points	
SAP Connector Questionnaire (provided by Expert Services)	X
Appropriate logins into Siebel eBusiness application and SAP development environment	X
SAP ALE configurations for RFC communications to other applications (see Siebel Enterprise Connector for SAP R/3 Guide for more information)	X
Presence of a SAP Administrator for ALE configuration, logon, other issues	X
EAI Workshop Engagement Details	
Engagement Length	2 days
Location	On-Site
Other Requirements	Access to the Lead Configurator and Project Manager
Note	To allow Expert Services to schedule the specialist with the correct skills, please outline the specific technologies for discussion in the EAI questionnaire.

Production Readiness Review

The Expert Services Production Readiness Reviews can assist in ensuring a successful production rollout and serves two main roles:

- Expert Services will proactively identify any major show stopping issues that may compromise the technical excellence of the implemented Siebel eBusiness solution. Expert Services will work very closely with the implementation team (Customer, Partner or SPS) to ensure a technically excellent solution.
- This review will reduce the risks of issues at runtime and give customers confidence in allowing the implementation to go live.

Items included in the review generally include:

- RDBMS optimization and configuration
- Hardware optimization and configuration
- Siebel Server Processes optimization and configuration (WFM, Siebel Remote, etc.)
- Mid Tier Environment setup and Object Manager Tuning Parameters
- Data visibility
- Security
- Check performance of most accessed views
- Backup and recovery
- Rollout strategies
- Siebel Anywhere

Benefits of Production Readiness Review

Production Readiness Reviews can significantly reduce deployment risk, ensure investment protection and Accelerated/Increased ROI.

Performance and Scalability

- Identify undersized database server resources
- Identify undersized Siebel Object Manager, AM, Workflow and EIM resources
- Identify incorrect database configuration
- Monitor and detect possible performance risks
- Address specific performance configuration and tuning issues

Data Integrity

- Identify adequacy of High Availability solution
- Identify the adequate disk configuration for RAID
- Recognize potential data integrity violations from new tables and indexes that have not been added via Siebel Tools

Upgradeability

- Assess whether existing/software resources are adequate for planned upgrades
- Identify unsupported hardware/software options for servers, middleware, management tools, custom integration
- Ensure that Siebel recommended practices are followed (i.e. no direct table updates etc.).

[Pre-Requisites, Checkpoints and Engagement Details](#)

Production Readiness Review Check Points	
Application Server – NT configuration, optimization, specifications and performance	X
Assignment Manager – processes, rules configuration and assignment review	X
Database configuration – in reference to Siebel Systems recommendations	X
Database connectivity – data interface (ODBC)	X
Database optimization	X
Disaster Recovery (backup)	X
EIM – processes and high level configuration review	X
Fail-over process	X
Load Balancing	X
Rollout Strategy – review strategies	X
High Level Security	X
Siebel Gateway – processes, configuration and specifications	X
Siebel Remote – processes and configuration	X
Siebel Server – processes, configuration, mirroring, and specifications	X
Siebel Marketing Enterprise (SME) Specific	
OLTP Database components that will be used to interact/integrate with the OLAP database	X
OLAP Data mart/warehouse Database	X
Informatica Hardware optimization and configuration	X
Business Objects Hardware optimization and configuration	X
ETL Data mapping performance	X
Specific areas on the Siebel OLTP database that will interact with the OLAP database such as Campaign Loading and ETL Datamapping performance	X
Backup and Recovery procedures	X
Production Readiness Review Pre-Requisites	
Access to the following resources:	
- Siebel Administrator	X
- Technical Architect and Project Manager	
- DBA	
Access to the following environments:	X
-Siebel Application Servers	
-Siebel Database Server	
-Siebel Client	
Production Readiness Review Engagement Details	
Engagement Length	3 days
Location	Typically 2 day on-site/ 1 day off-site
Pre-requisite Reviews	Sizing Review Design Review Configuration Review
Follow up conference call	Yes
Review Deliverables	Final comprehensive review document discussing - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call
Engagement Length	3 days

Performance Tuning Audit

The Performance Tuning System Audit is a review designed to ensure optimal performance across the Siebel enterprise architecture environment. Siebel Expert Services leverages its in-depth experience from a wide array of deployments to conduct this comprehensive review.

- Expert Services will proactively identify any performance issues.
- This review will reduce the risks of issues at runtime and gives customers confidence in allowing the implementation to go live.

This review can be customized to focus on a specific area (e.g. EIM). Its purpose is to measure:

- RDBMS optimization and configuration
- Mid Tier Environment setup and Object Manager Tuning Parameters
- Hardware optimization and configuration
- Any specific performance issues with the client configuration
- Data visibility and Security
- High Level Siebel Server Processes optimization and configuration (WFM, Siebel Remote, etc.)
 - Enterprise Integration Manager
 - Siebel Remote
 - Replication Manager

Benefits of Performance Tuning Audit

- Ensure correct sizing of hardware for running server resources (EIM, Workflow, AM) and confirm that these processes configuration and setup meets the established requirements of the business
- Identify database performance issues and confirm that database performance configuration and set-up meets the established requirements of the business.
- Ensuring correct sizing of client and server resources will help to ensure the UI performance required by end users is achieved.
- Ensuring correct DB configuration will pro-actively prevent DB degradation and will ensure that the application will perform as required for all users over a longer period of time.
- Assist in tuning that will improve performance for specific UI views and specific server processes
- Correct distribution of processes and users across Siebel servers will ensure optimum usage of hardware resources and will ensure that the Siebel deployment will perform as required as more users and processes are added.
- Determine the scalability requirements of Siebel Remote and Replication to ensure that the specific hardware can be configured and tuned to handle the volume and demand of remote users.

[Pre-Requisites, Checkpoints and Engagement Details](#)

Performance Tuning Audit Check Points

Application Server – NT configuration, optimization, specifications and performance	X
Assignment Manager – processes, rules configuration and assignment review	X
Workflow Manager – processes and configuration	X
Database configuration – in reference to Siebel Systems recommendations	X
Database connectivity – data interface (ODBC)	X
Database optimization – Specifically performance and scalability	X
Check Load Balancing	X
Siebel Gateway – processes, configuration and specifications	X
Siebel Remote – processes and configuration	X
Siebel Server – processes, configuration, mirroring, and specifications	X
Mid Tier Setup (Object Manager)	X
Check performance of most accessed Views	
Siebel Marketing Enterprise (SME) Specific	
OLAP Database Performance tuning	X
Hardware optimization and configuration for the OLAP database	X
Performance of ETL Data Transformations	X
OLTP performance issues specific to the SME environment	X
Performance of campaign loads	

Performance Tuning Audit Pre-Requisites

Access to the following resources	
- Siebel Administrator	X
- Technical Architect and Project Manager	
- DBA	
Network and Server utilization or performance statistics	X
Access to the following environments	X
-Siebel Application Servers	
-Siebel Database Server	
-Siebel Client	

Performance Tuning Audit Engagement Details

Engagement Length	2-3 days (more complex issues may require extra time)
Location	Typically 1 day on-site/ 1 day off-site
Pre Conference Call	Yes. A pre-review conference call is recommended, in cases were there are specific issues that require some research
Follow up conference call	Yes
Review Deliverables	Final comprehensive review document discussing <ul style="list-style-type: none"> - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call
Performance Tuning Consultancy	For specific performance issues, a Siebel architecture specialist can attend onsite and lead the client's team to resolution. These engagements vary accordingly.

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Production Health Check

The Siebel Production Health Check is the most effective method to ensure that the Siebel eBusiness environment continuously operates under optimum system performance and reliability, by providing proactive and ongoing performance tuning improvement. The service has the following aims:

- Identify and address existing performance and stability bottlenecks
- Recommend resolution of performance issues at the database, architecture and application level
- Establish an ongoing plan for continuous system performance monitoring and enhancement
- As an optional and additional service to implement recommendations made in the initial and ongoing reviews

The Siebel Production Health Check consists of a formalized evaluation and assessment process after production rollout. It starts with a questionnaire or conference call with the customer to rapidly pre-assess their environment and needs. A comprehensive diagnostic process is conducted and assessment of the technical architecture is conducted including:

- Database Performance
- Siebel Network Performance and Security
- Application Topology
- Database and Application Sizing
- Mid Tier performance
- Key Application queries
- Discuss specific end user requirements
- Discuss specific administrator requirements
- Backup and Recovery Strategies

The service also provides an ongoing periodic review process using Expert Services extensive diagnostic tools. At predefined intervals, a specialist will work with system administrators, end users and developers to identify changes since the last review, and perform diagnostics to identify possible future bottlenecks. The ongoing reviews have been designed to ensure consistent optimization of the Siebel application as the business changes. Items that will be take into consideration are;

- Anticipation of user growth
- Anticipation of user activity
- Changes in application configuration since the last review
- Changes in application architecture since the last review
- Check that the recommendations made during the prior review have been implemented correctly

The ongoing review is provided off-site to reduce costs. Each ongoing assessment will be presented in a detailed review document with a consolidated "Scorecard" to illustrate the benchmark performance improvement/deterioration compared to the previous review so system administrators can easily understand areas of strength and opportunities for improvement.

[Pre-Requisites, Checkpoints and Engagement Details](#)

Production Health Check Review Points

Architecture

Database configuration - in reference to Siebel Systems recommendations (RDBMS Configuration, SGA Sizing, Memory and CPU Average Usage, Database Growth Rate, Disk Free Space, Data Fragmentation, Biggest Tables' Monitoring)	X
Identify undersized database server resources	X
Identify unsupported hardware/software options for servers, middleware, management tools, custom integration	X
Monitor and detect possible performance risks	X
Web servers are tuned for optimum server performance, including CPU and memory utilization and I/O contention	X
Identify undersized Siebel Server resources (AM, Workflow, etc.)	X
Application Server - OS configuration, optimization, specifications and performance	X
Siebel Gateway - processes, configuration and specifications	X
Siebel Remote - processes and configuration	X
Siebel Servers - processes, configuration, mirroring, and specifications	X
Replication Manager – Configuration	X
Disaster Recovery (backup) - procedures	X
Administrator Specific requirements for performance of specific tasks	X
Database connectivity - data interface (ODBC)	X

Application

End User Specific requirements for performance of specific views	X
Siebel File System Usage	X
Application code and queries execute efficiently	X

Data Integration

EIM - processes and configuration review	X
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PHC Pre-Requisites

The Siebel Technical Account Manager will provide a high level description of what issues and specific technology areas the customer would like to focus on in the initial assessment	X
Full access to the development and production environment to ensure running of the diagnostic tools during the initial and ongoing review process	X
Access to key users and administrators during the initial and ongoing review process	X

PHC Engagement Details

Initial Engagement Length	3 days Initial
On Going Engagement Length	2 days per quarter
Location	1 day on-site/ 1 day off-site
Review Deliverables	Final comprehensive review document discussing <ul style="list-style-type: none"> - Major issues and suggested recommendations - Assistance to specific issues noted - Follow up conference call

EAI Design Review

EAI Design Reviews are performed during the design stage of a project to ensure alignment of the chosen integration points with both best practices and to highlight any issues at an early stage.

The purpose of the review is two-fold. First, it reviews how the proposed design fits in the customer's environment and to propose any alternatives that might achieve the same ends but with higher performance or easier maintenance. Second, it finds any possible design or performance bottlenecks and highlight these to the project team. The review may also provide information concerning the integration of Siebel through non-validated adapters if required.

The Expert Services Specialist will conduct pre- and post-review conference calls with the TAM and the integration team. During the first call, the specialist will set expectations about the scope of the review, note any questions the integrator or customer may have, and make a note of specific areas of the design which should be more closely examined. The specialist will further explain and answer any questions about the deliverable document on the second conference call. To avoid unmet expectations, it is encouraged that both calls take place.

During the review, the Specialist will review all the documentation submitted. The specialist will review both the overall EAI architecture and the proposed configuration changes required to provide the end-to-end integration. The customer can reasonably expect the Specialist to comment on the validity as well as an upgrade or performance issues inherent in the design. While specific comments about unreleased versions of the software will not be made, the Specialist will endeavor to guide customers towards an integration strategy consistent with the published Siebel Statements of Direction wherever possible. This can include suggestions for a migration path from existing integration requirements towards making full use of Universal Application Networking (UAN) in the future.

If the development team has provides a list of issues, the specialist will spend extra time to research the issues and provide solutions/workarounds. The workaround may involve design changes, additional configuration, and/or scripting. The specialist will provide examples (e.g. scripts) of such workarounds.

[Pre-Requisites, Checkpoints and Engagement Details](#)

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EAI Design Review Check Points	
Data Mapping Issues (Complex transformations, radically differing data models, Siebel Internal and External integration objects)	X
Recommend best practices for the integration effort	X
Workflow process requirements (Data flows, Business Service implementation, Synchronization issues)	X
EAI architecture issues (network bandwidth, scalability issues, data integrity, data loss)	X
Highlight all areas requiring particularly complex integration	X
Suggestions to simplify complex processes	X
Potential performance bottlenecks in the proposed integration architecture	X
Estimate timeframes required to implement the integration points outlined	X
Recommend best practices for the integration effort	X
Review Proposed Integration Points	X
Point-to-Point versus Middleware	
Review Integration Strategy	
SAP Connector Design Review Checkpoints	
Reviewing, proposing and discussing modifications to existing configuration, data transformation mappings and design	X
Analyzing the design, configuration and workarounds	X
EAI Design Review Pre-Requisites	
Implementation specific information such as middleware or system vendors to the Specialist	X
Technical Account Manager (TAM) should describe the Workshop to the customer and work with the customer to identify and prioritize issues that the customer would like to discuss	X
Requirements and Design specification documents to be sent to the specialist	X
Proposed Architecture Diagram/Integration Flows	X
Functional Requirements	X
Data mapping spreadsheets	X
List of issues/questions	X
Pre-review conference call to discuss the requirements and set expectations	X
SAP Connector Design Review Specific Pre-Requisites	
Business Requirements	X
SAP Connector Design Template and/or design documents	X
Other relevant files (e.g. XML exports of new or updated Business Services and WF Processes) and mapping spreadsheets	X
A SAP Connector setup for testing if needed	X
EAI Design Review Engagement Details	
Engagement Length	2 days
Location	On-Site
Other Requirements	Access to the Lead Configurator and Project Manager
SAP Connector Design Review Pre-requisites	
Engagement Length	Typically 3-5 days
Location	Off-Site
Other Requirements	Presence of a SAP Administrator for ALE configuration, logon, list of other issues to discuss

Assignment Manager Design Review

The Assignment Manager Review is generally a pre-production review designed to ensure optimal design and implementation of Assignment Rules.

Siebel Expert Services have been involved in a wide array of deployments and leverage this knowledge in a comprehensive review. This is generally a two to three day review that can be performed remotely to reduce costs incurred by the customer in travel expenses. The objectives of the Assignment Manager review will include a subset of the following:

- To ensure that the customer's business requirements are met via the Assignment Rules the customer has configured.
- To review any customizations made to Assignment Manager (ie the addition of Assignment Objects, Assignment Criteria, etc).
- To ensure Assignment Rules are optimally configured.
- To consider any performance implications of the Assignment Manager setup including a review of potential data volumes, triggers, etc.
- To resolve any specific Assignment Manager questions and issues.

Assignment Manager Design Review Pre-Requisites

Prior to an Assignment Review, the client/TAM should have the following ready:

Business requirements	X
Assignment Rules as configured by the client	X
Any customizations made to the Assignment Manager	X
Relevant performance information such as data volumes, triggers, etc.	X
The customer should complete the Assignment Manager Data Sheet	X
The customer should provide a local database and/or related documentation as appropriate	X

Assignment Manager Design Review Pre-Requisites

Duration	Typically 2-3 days
Location	Typically Off Site

Global Deployment Workshop

The Global Deployment workshop is a one-day on-site workshop to analyze the requirements for a Global Deployment project, discuss the Global Deployment features available with Siebel, and to determine the best technical architecture for the project specific to the Global Deployment. Following Siebel implementation best practices, the workshop is an opportunity for Expert Services to:

- Assist the customer implementation teams define and discuss the Siebel eBusiness design specific to Global Deployment issues
- Reduce the likelihood of incorrect assumptions that can lead to project inefficiencies and backtracking by proactively engaging with the customer implementation team from an early stage
- Facilitate knowledge transfer and allow for the discussion of planned strategies and alternatives

Areas Covered in this Workshop

- Discuss Database Code Pages
- Discuss Siebel Versions and Language builds
- Discuss the detailed areas of Global Deployment specific to the Siebel eBusiness implementation
 - Multiple Currencies
 - List of Value (LOV) Conversion
 - UI Requirements
 - Architecture issues
- Discuss maintenance and upgrade issues
- Discuss Performance issues specific to Global Deployment

[Pre-Requisites, Checkpoints and Engagement Details](#)

Global Deployment Workshop Items	
Discuss Database Code Pages	X
Global Deployment Architecture Options	X
Discuss Siebel Versions and Language builds	X
Multiple Currencies	X
List of Value Conversion	X
UI Requirements	X
Discuss maintenance and upgrade considerations	X
Discuss Performance issues specific to Global Deployment	X
Global Deployment Workshop Pre-Requisites	
Completed Global Deployment Workshop Questionnaire	X
List of issues for discussion during workshop	X
Global Deployment Workshop Engagement Details	
Location	On Site
Duration	1-2 days

EAI Configuration Review

EAI Configuration Reviews are performed at the end of the implementation phase of a project to ensure alignment of the chosen integration points with best practices and to highlight any issues that may have been introduced during implementation.

The purpose of the review is to ensure that any issues that may cause problems in a production deployment of the integration solution are highlighted so that the project team can minimize the risk that these present. By reviewing the earlier EAI Design Review the Expert Services Specialist can check that best practices have been followed through the implementation, investigate any potential data integrity and reliability issues introduced during implementation and suggest areas where performance tuning of the integration work may show the best improvements.

The Expert Services Specialist will conduct pre- and post-review conference calls with the TAM and the integration team. During the first call, the specialist will set expectations about the scope of the review, note any questions the integrator or customer may have, and make a note of specific areas of the implementation which should be more closely examined. The specialist will further explain and answer any questions about the deliverable document on the second conference call. To avoid unmet expectations, it is encouraged that both calls take place.

Details:

The review process conducted by a Siebel Expert Services specialist typically takes a minimum of three days, with more time potentially required if complex requirements are to be addressed. At the end of the review, a meeting is scheduled with key team members to review findings and recommendations.

During the review, the specialist will review the configuration that has taken place to satisfy the integration points together with the architecture this will be deployed into. The specialist will review both the overall EAI work and each individual integration path individually. The customer can reasonably expect the specialist to highlight upgrade or performance issues inherent in the design, together with suggested remedies or workarounds to improve the impact of these issues.

If the development team has provided a list of issues, the specialist will spend extra time to research each issue and provide solutions/workarounds. The workaround may involve design changes, additional configuration, and/or scripting. The specialist will provide examples (e.g. scripts) of such workarounds.

[Pre-Requisites, Checkpoints and Engagement Details](#)

EAI Configuration Review Check Points	
Data Mapping Issues (Complex transformations, radically differing data models, Siebel Internal and External integration objects)	X
Workflow process requirements (Data flows, Complexity, Business Service usage, Synchronization and Response issues)	X
EAI architecture issues (Network bandwidth, scalability issues, data integrity, data loss)	X
Highlight all areas requiring extensive unit and scalability testing	X
Suggestions to simplify complex processes	X
Estimate timeframes required to implement the integration points outlined	X
Identify any areas where best practices should have been used.	X
Potential performance bottlenecks in the proposed integration architecture	X
EAI Configuration Review Pre-Requisites	
Customer repository and supporting files:	
- Local database extract	
- Repository (SRF) file	X
- Supporting web template and other user interface files	X
- Supporting XML templates, DTDs and other integration files	X
All supporting documentation (EAI requirements or high-level design documents). This may include one or more of the following:	
- Proposed Architecture Diagram/Integration Flows	X
- Functional Requirements	X
- Data mapping spreadsheets	X
- List of issues/questions	X
- Pre-review conference call to discuss the requirements and set expectations	X
- EAI Design Review deliverable	X
EAI Configuration Review Engagement Details	
Engagement Length	Typically 3 days
Location	On-Site
Other Requirements	Access to the Lead Configurator and Project Manager responsible for data integration

EIM Design and Mapping Review

The EIM Mapping Review is a development stage review designed to ensure that the client is using the correct EIM mappings to interface data into and out of the Siebel eBusiness application. This is a remote review in order to reduce costs incurred by the customer in travel expenses.

In this review, Siebel Expert Services will:

- Evaluate the EIM mappings design
- Review the validity of all mappings specified in the mapping spreadsheet
- Ensure that the correct IF tables and mappings are used to migrate data into the Siebel eBusiness database
- Optionally, check for syntax error and processing order, if IFB files are provided
- Optionally, provide feedback on data integration processes across legacy system(s), if design documents are provided
- Provide a comprehensive EIM Mappings Review document specific to the client's environment and meet with key team members concerning review findings and recommendations

[Pre-Requisites, Checkpoints and Engagement Details](#)

EIM Mapping and Design Review Check Points	
Evaluate the EIM mappings design	X
Review the validity of all mappings specified in the mapping spreadsheet	X
Ensure that the correct IF tables and mappings are used to migrate data into the Siebel eBusiness database	
Optionally, check for syntax error and processing order, if IFB files are provided	
Optionally, provide feedback on data integration processes across legacy system(s), if design documents are provided	X
EIM Mapping and Design Review Pre-Requisites	
Assisted by the Siebel Technical Account Manager (TAM) and the system integrator, the client should provide a completed DATAMAP.XLS (EIM Mappings spreadsheet) to include:	
Column/field mappings transferred from the legacy system into the Siebel eBusiness application business component fields	X
Interface tables and Interface columns to be used for EIM processing	X
Optionally, IFB files and design documents on the integration strategy	X
EIM Mapping and Design Review Engagement Details	
Engagement Length	Typically 3 days
Location	Off-Site
Other Requirements	Access to the EIM Lead and Project Manager responsible for data integration

CTI Workshop

The Siebel CTI Workshop is an onsite workshop that may be flexibly tailored to the customer's or integrator's requirements. The broad purpose of the workshop is to help the customer management team to understand the overall CTI architecture and how it fits in with the overall environment, and also to bring Siebel configurators up-to-speed in configuring Siebel CTI according to best practices. It may also address any specific concerns with the particular implementation. The duration is between 1 and 5 days.

A Siebel CTI Specialist will lead the presentation and discussion. The TAM and the Siebel CTI Specialist may tailor the workshop to suit the customer's needs, from a one day discussion of architecture and implementation best practices to a full week of hands on CTI training and discussion of the customer's specific implementation.

Some example areas which may be covered in the workshop may include:

Siebel CTI Architecture and Implementation

- Overall Siebel CTI architecture
- Which components provide which functionality e.g. call routing
- How is Siebel best integrated with the CTI middleware, IVR and other call center components
- How is Siebel CTI configured
- Hardware and network requirements and physical architecture
- New CTI related features in Siebel 7 (if upgrading)

Configuring Siebel CTI

- How is Siebel CTI configured
- Limits of Siebel CTI, when to use SiebelVB/eScript

Demonstration or labs of a standard Siebel CTI configuration

Best practices

This may include up to five days of training, including labs, which will give integrators new to Siebel CTI a good grounding in the configuration process. A suitable environment (middleware and switch installed and configured) will be required for any labs.

Siebel Adaptive CTI

- How may a middleware driver be extended to take advantage of middleware capabilities that are not currently supported.
- How can Siebel CTI best be integrated with CTI middleware that is not supported out of the box.
- Siebel CTI out of the box: Siebel CTI integration with currently validated CTI middleware solution
- Validation process

Other topics, such as integration with eMail Response, Universal Queuing or other channels are available on request and should be discussed with the TAM and the Siebel CTI specialist.

[Pre-Requisites, Checkpoints and Engagement Details](#)

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CTI Workshop Discussion Items	
If all components of the Workshop are performed, the customer can reasonably expect:	
To understand how Siebel CTI works	X
To understand how Siebel CTI fits in with other components such as CTI middleware, IVR, PBX.	X
To understand how Siebel CTI Applications can meet business requirements.	X
To gain a working knowledge of the design and configuration process.	X
To understand best practices for configuring Siebel CTI.	X
Workshop Pre-Requisites	
List of Issues for discussion during the Workshop	X
Any documentation pertaining to the implementation of the Siebel CTI Architecture	X
Workshop Engagement Details	
Engagement Length	1-2 days (Engagement document 1 day billable activity)
Location	On-Site
Follow up conference call	NO
Other Requirements	Access to the DBA and lead architect
Special Note 1	<p>Regardless of which components are performed, the customer should not expect:</p> <ul style="list-style-type: none"> ▪ Siebel installation assistance unless specified in advance ▪ Assistance with CTI Middleware, IVR, PBX, Siebel Server, and Gateway Server setup or installation, or upgrades ▪ A detailed Design or Configuration Review ▪ Any commitments for deliverable documents unless agreed in advance
Special Note 2	<p>Before a CTI workshop is scheduled, the Technical Account Manager (TAM) should describe the Workshop to the customer and work with the customer to identify and prioritize issues that the customer would like to discuss. If the customer already has requirements and design specifications developed, these documents should be provided to the Siebel CTI specialist. If any hands-on demonstration or training is required, then a suitable environment, i.e. a CTI Lab, is required.</p>

CTI Design Review

CTI Design Reviews are used at the planning stage to ensure compatibility of the CTI systems (software and hardware) that are being integrated and to highlight any issues at an early stage.

A comprehensive CTI Design Review will:

Assess the following areas:

- Switch/Middleware versions used other than CTI systems (IVR, call center monitoring tools, voice recorders, etc.)
- Call Center workflow requirements (call flows, agent states, screen pop requirements)
- Call Center architecture issues (multiple sites, Replication Manager, call routing requirements, Agent Administration requirements)
- Outline the implementation process
- Highlight all areas requiring nonstandard configuration/integration
- Estimate timeframes required to implement the features outlined
- Recommend best practices for the integration effort

Provide a comprehensive CTI Review document that details findings and recommendations specific to the client's CTI design. This document will be discussed with the Siebel Technical Account Manager (TAM) and the development team in a follow-up conference call.

CTI Design Review Pre-Requisites and Engagement Details

Before Expert Services can begin a CTI Design Review, the customer/TAM should have the following ready:

Completion of the CTI Design Review Questionnaire	X
Any supporting documentation (CTI requirements or high-level design documents)	X
A meeting or conference call to discuss what the client wants to focus on	X
Engagement Length	3 days (2 for Siebel 5/6). Please note that more time will be required if complex requirements are to be addressed
Location	Off-Site
Other Requirements	Availability of CTI Project Lead
Note 1	Before getting started it is important to have a conference call meeting to review what areas, if any, the customer would like us to focus on. At the end of the review, we recommend a conference call meeting with key team members to review findings and go over recommendations.
Note 2	The specialist will review the business requirements and design presented in documents, spreadsheets, and other files. After necessary analysis, research (and testing if needed), he/she will provide feedback on the overall design, process details, open issues and will also identify alternate solutions/workarounds and issues.
Deliverable	The customer can expect a document containing suggestions and considerations once the review is complete. A follow -up conference call could be arranged to discuss the details of the document and any additional concerns.

CTI Configuration Review

CTI Configuration Reviews are used at the configuration stage to ensure validity of the Call Center design and configured functionality that are being integrated and to highlight any issues at the deployment/configuration stage.

Purpose

A comprehensive CTI Configuration Review will:

- Assess the following areas:
 - Call Center Design validation (Platforms, middleware-switch-Siebel CTI integration)
 - Call Center workflow implementation (call flows, agent states, screen pop configurations)
 - Call Center architecture design (multiple sites, Replication Manager, call routing requirements, Agent Administration requirements)
 - Implementation validation
 - Review all areas requiring non-standard configuration/integration
 - Review CTI related scripts
 - Review the implementation for performance
- Provide a comprehensive CTI Review document that details findings and recommendations specific to the client's CTI implementation. This document will be discussed with the Siebel Technical Account Manager (TAM) and the development team in a follow-up conference call,

[Pre-Requisites, Checkpoints and Engagement Details](#)

CTI Design Configuration Pre-Requisites	
Before Expert Services can begin a CTI Design Review, the customer/TAM should have the following ready:	
Completion of the CTI Configuration Review Questionnaire	X
Any supporting documentation (CTI requirements or high-level design documents)	X
A meeting or conference call to discuss what the client wants to focus on	X
CTI Configuration Review Engagement Details	
Engagement Length	3-5 days. Please note that more time will be required if complex requirements are to be addressed
Location	On- Site
Other Requirements	Availability of CTI Project Lead and Switch and/or middleware administrator
Note 1	Before getting started it is important to have a conference call meeting to review what areas, if any, the customer would like us to focus on. At the end of the review, we recommend a conference call meeting with key team members to review findings and go over recommendations.
Note 2	The specialist will review the business requirements and design presented in documents, spreadsheets, and other files before the onsite engagement. During the onsite validation, he/she will provide feedback on the overall design, process details, configuration, open issues and will also identify alternate solutions/workarounds and issues if applicable.
Deliverable	The customer can expect a document containing suggestions and considerations once the review is complete. A follow-up conference call could be arranged to discuss the details of the document and any additional concerns.

Analytics Design Review

The Siebel Analytics Design Review evaluates the client's initial design for a Siebel Analytics implementation, specifically the mappings within the Informatica application. The Siebel Analytics Design Review should be conducted prior to customizing ETL mappings within Informatica, Siebel Analytics and the Siebel Data Warehouse.

The Siebel Analytics Design review will help customers validate the Siebel Analytics design documentation with area specialists to ensure optimal implementation and to ascertain that any customizations specific to Siebel Analytics are in the domain of supported functionality, and to ensure proper use of the Siebel Data Warehouse Data Model.

This review focuses on the following:

- Reviewing, proposing and discussing any modifications required to the Siebel Analytics design. The main issues checked are:
 - Any modifications required to the STAR Schema's, along with any new STAR schema's definitions required. This includes reviewing all new Star Schemas that are created along with the relationships between fact and Dimension tables defined.
 - Reviewing the Informatica ETL (extract, Load, Transform) Data Mappings.
 - Review any Siebel Analytics design issues.
 - Helping identify time frame, risk areas and caveats.
 - Verify the accuracy of the design developed by the team.
- Evaluate and clarify the following major items specific to the Siebel Analytics application:
 - Functionality
 - Consistency of definition throughout the system
 - Performance
- Any maintenance/upgrade issues that may arise in the future.

The specialist will review the ETL mappings design presented in design documents, all changes required to the Star Schemas along with any changes to Siebel Analytics. After reviewing the design the specialist will provide feedback on the overall design and will identify any alternate solutions/workarounds and issues that may have been found. At the end of the review, we recommend a conference call meeting with key team members to review findings and go over recommendations.

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Analytics Design Review Pre-Requisites

Before Expert Services can begin an eBusiness Analytics/Data Mart Design Review, the customer/TAM should have the following documentation ready:

Proposed Data Warehouse Data Model. (This should represent the Star Schemas that are to be used.)	X
ETL Mapping design document (Includes those mappings being used, added or not used).	X
Siebel Analytics reporting requirements, along with any other design documentation relevant to the configuration of Siebel Analytics.	X
A list of any specific design issues.	X

Analytics Design Review Engagement Details

Duration	2-3 Days
Location	Off-Site
Deliverable	The customer can expect a document containing suggestions and considerations once the review is complete. A follow-up conference call could be arranged to discuss the details of the document and any additional concerns.
Further Engagement Details	The specialist will review the ETL mappings design presented in documents, along with any changes required within Business Objects. After reviewing the design, the specialist will provide feedback on the overall design and will identify any alternate solutions/workarounds and issues that may have been found. At the end of the review, we recommend a conference call meeting with key team members to review findings and go over recommendations.
Note	The Siebel Analytics Design Review will evaluate all design requirements specific to the Siebel Analytics application. A separate review should be scheduled for the Siebel Marketing (SME) Design using the Design Review.

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Analytics Configuration Review

The Siebel Analytics Configuration Review reviews the configurations and customizations made to Siebel Analytics, specifically the configuration performed within the Informatica application.

The Siebel Analytics Configuration review will help customers validate the configurations and customizations made to the Siebel Analytics product and Informatica with an area specialist to ensure optimal implementation and to ascertain that any customizations are in the domain of supported functionality and Siebel best practices.

This process involves reviewing, proposing and discussing modifications to configuration specific to the Siebel Analytics application. Main issues checked are as follows:

- Configurations to the STAR Schema's and Siebel Analytics
- Informatica ETL (extract, Load, Transform) Data Mappings
- Helping identify time frame, risk areas and caveats
- Educating on the configuration/customization process so that the customer is self sufficient for future requirements
- Verify the accuracy of the configurations performed by the development team
- Optimize the configurations
- Evaluate and clarify the following major items specific to the Siebel Analytics application:
 - Functionality
 - Clean and consistent UI
 - Performance
 - Maintenance and upgrade issues

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Analytics Configuration Review Pre-Requisites

Before Expert Services can begin an eBusiness Configuration Review, the customer/TAM should have the following ready:

All relevant Design Documentation listing the Star Schemas to be used, along with a list of the ETL mappings that has been configured.	X
Access to Informatica Designer.	X
Access to Siebel Analytics.	X
User Names and Passwords to Informatica, and Siebel Analytics.	
A list of any specific configuration issues.	X

Analytics Configuration Review Engagement Details

Duration	2-3 Days The length of engagement depends on the number, type and complexity of configurations and processes involved to satisfy business requirements
Location	On-Site
Deliverable	Once the review is complete, the customer can expect a document containing suggestions and considerations relating to the Siebel Analytics configuration, as well as configuration issues relating to the Informatica mappings. A follow up conference call could be arranged to discuss the details of the document and any additional concerns.
Note 1	The Siebel Analytics Configuration Review will evaluate all configurations specific to the Siebel Analytics application. The Siebel Analytics Configuration review does not cover the SME Configuration application. Please schedule the SME Configuration review to analyze configurations specific to this application. The same reviewer may perform the two reviews.
Note 2	The specialist will review the business requirements and design presented in documents, spreadsheets, and all other files. After necessary analysis, research (and testing if needed), the specialist will provide feedback on the overall configuration process details, open issues and will also identify alternate solutions/workarounds and issues. Before getting started it is important to have a conference call meeting to review what areas, if any, the customer would like us to focus on. At the end of the review, we recommend a conference call meeting with key team members to review findings and go over recommendations.